IDC MarketScape

IDC MarketScape: Worldwide Supply Chain Oracle Ecosystem Services 2025–2026 Vendor Assessment

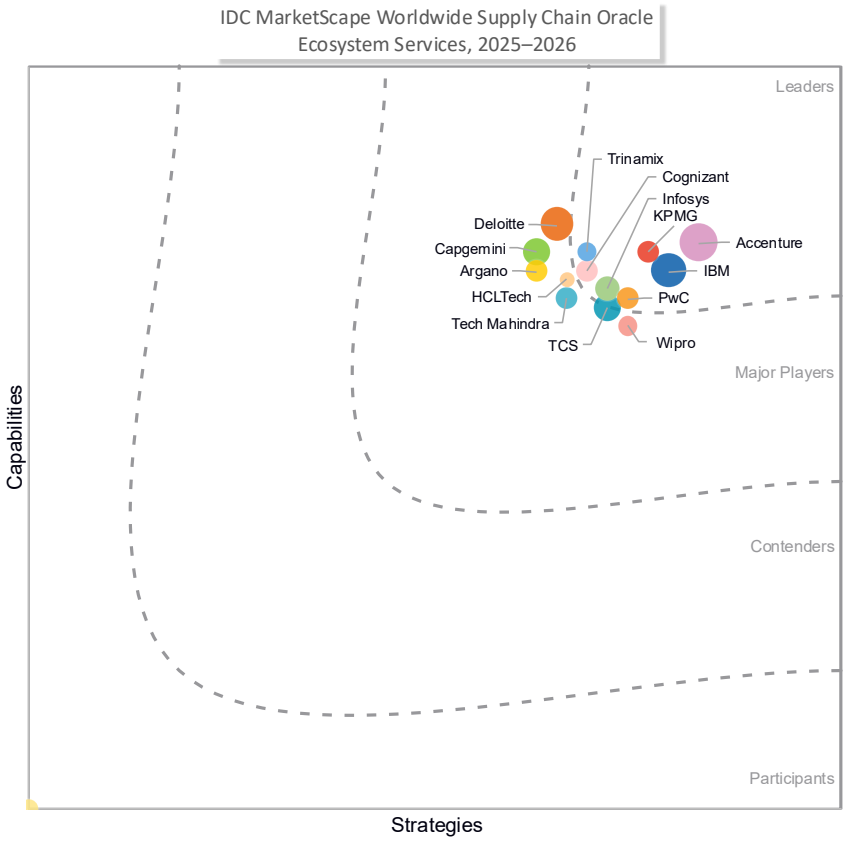
Eric Thompson

THIS EXCERPT FEATURES IBM AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Supply Chain Oracle Ecosystem Services Vendor Assessment



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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Supply Chain Oracle Ecosystem Services 2025–2026 Vendor Assessment (Doc # US53932925).

IDC OPINION

While supply chains in all industries, including manufacturing, have long been advancing their digital transformation journeys, investment in supply chain capabilities has dramatically accelerated in the past five years.

In the face of supply disruption, demand volatility, and macroeconomic pressures, supply chains have become highly focused on resiliency. The integration of all operations, risk assessments, responsiveness, visibility, and agility have all been hallmarks of recent supply chain investments.

Advancements in AI have increased the focus on this space, and enterprises are looking for partners to help them achieve digital maturity gains and balance efficiency and resiliency.

With this backdrop, there is high value in selecting outstanding partners to aid in digital transformation and support technological and organizational shifts aimed at increasing supply chain resiliency and efficiency.

Across manufacturing and retail supply chains, a significant number of vendors provide supply chain management (SCM) applications to address these needs. Many strategic integration firms have developed targeted practices for these product companies. Many companies realized that their supply chain capabilities were neither robust nor resilient, and IDC sees a renewed focus from them. This means an increase in the assessment and implementation of supply chain management tools and in the adoption of new technologies such as cloud and AI to support the digital journey. Strategic integration firms with notable supply chain practices are a key component of success in this journey, whether it's to provide advisory services, business process outsourcing, application development and integration, or ongoing support and continuous improvement.

This 2025 IDC MarketScape for worldwide supply chain Oracle ecosystem services looks at IT services firms that support the assessment, selection, and implementation of all

suites of supply chain management tools. Although many of these firms support a broader range of IT tools, this study only assesses the supply chain. The research is both a quantitative and a qualitative assessment of the characteristics and capabilities impacting a vendor's success in delivering supply chain transformation to manufacturers and retailers. In the assessment, four common opportunities/challenges that IT services firms must address emerged:

- Although the cloud has not yet significantly surpassed on-premises solutions based on the measure of the overall installed market, the growth rates of cloud adoption in recent years have been and will be much higher, and the future of supply chain applications seems quite clear. The ability of supply chain services firms to support cloud products is critical.
- Building a road map for supply chain transformation is complex and often challenging, leading to a series of pilots or extended implementation cycles. IT firms that perform particularly effectively do so by integrating assessment tools with implementatio/integration.
- Many manufacturers and retailers still run supply chain management tools from multiple vendors and may find that cloud offerings lack specific industry functionality. The ability of IT services firms to help integrate disparate tools and offer task apps that bridge functionality gaps was also an important part of this assessment.
- Attention was given to emerging technologies such as GenAI, agentic AI, decision support/intelligence, end-to-end (E2E) orchestration, and other capabilities.

Although IDC would not hesitate to recommend any of the vendors included in this assessment, to mitigate the aforementioned challenges, manufacturers and retailers should look for the following capabilities in their chosen SCM IT consulting firms:

- A proven track record of business model transformation in the supply chain
- A culture of innovation and expertise in relevant innovative technologies
- The ability to create a road map for supply chain transformation at a global scale
- Experience/expertise in specific subsegments of manufacturing or retail, high tech, or consumer products as examples
- Experience with manufacturers or retailers of a similar size
- Clarity of vision/strategy to guide the manufacturer or retailer and not be led

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This study assesses the capability and business strategy of many notable IT consulting vendors in the supply chain Oracle ecosystem services market. While all vendors

included in this IDC MarketScape deliver a broad range of capabilities and offerings within the end-to-end supply chain market, they offer a variety of approaches and have expertise in a breadth of subvertical industries and company sizes within manufacturing and retail. This IDC MarketScape's shortlist highlights both the current capabilities and future strategies of each IT consulting vendor in enabling technology buyers to more efficiently identify the appropriate fit to support their respective supply chain transformation goals and needs. It should be noted that, in calling this a shortlist, IDC includes only a subset of vendors in the space. Therefore, it is our view that all these vendors are serving vital roles in the Oracle ecosystem and are already ranked above many other firms. Many IT consulting firms offer supply chain management services to the manufacturing and retail industries. IDC chose the vendor inclusion criteria for this study to accurately portray the vendors that are representative of the supply chain services buyer's selection list. This document cannot replace the due diligence necessary to select a services firm, but it is useful as a data point in a manufacturer's decision-making process to sharpen the vendor evaluation process. This IDC MarketScape focuses on the IT consulting vendors that meet the criteria and prioritize a broad set of offerings and capabilities to support the Oracle SCM ecosystem. This study focuses on IT consulting firms/vendors with the following characteristics:

- Vendors must have a global presence, with engagements in at least two major geographic regions.
- Vendors must have industry breadth, with engagements in manufacturing and at least one additional industry (e.g., retail, life sciences, wholesale, etc.).
- Vendors must have been offering supply chain–related integration and implementation services for at least five years.
- Vendors must have at least 20 client engagements in the Oracle supply chain ecosystem.

ADVICE FOR TECHNOLOGY BUYERS

Although supply chain transformation has been an important priority for many companies, the past five years have been a period of uncertainty and disruption globally, exposing supply chains' weaknesses in responding to the challenges posed by the COVID-19 pandemic, wars, trade protectionism, and macroeconomic pressures. Indeed, this tumultuous period has shed light on what supply chain executives have known for some time now: Connectivity and automation are crucial to operating today's complex global businesses, and digital transformation across supply chains and software to manage specific processes — combined with technologies that can sense, gather, secure, cleanse, compile, and analyze necessary data — must be a part of a modern, resilient supply chain.

IDC expects companies that invest in resiliency and digital competencies in their supply chains will outperform those that do not in the foreseeable future. Although the direct impact of the pandemic is starting to fade, its broader ramifications will reverberate for years. We have been seeing — and continue to foresee — a general modernization and refurbishment of traditional supply chain approaches.

For manufacturers and retailers embarking on or continuing their supply chain transformation journey, IDC offers the following guidance:

- **Prepare your supply chain organization for a transformation journey, not one-off skunkworks or pilots.** It is critical, in the strategic planning phase, to view all technology investments through the lens of a digital journey. If an investment or a project cannot link to a broader strategy, it should be reassessed for its criticality to business transformation. Manufacturers and retailers must be able to leverage the success and value of each investment within a broader journey of supply chain transformation. Ensure that the IT services firm you select can be a partner on this journey.
- **Look for the right services partner.** The right services partner should understand your industry and any technical limitations you may have and show a deep understanding of the Oracle ecosystem supply chain product suite that you select.
- **Select an IT service partner that brings strong technical chops and has task-app capabilities.** There is no single supply chain product vendor that can meet the needs of all manufacturers and retailers.
- **Create shared goals and outcomes that can be measured and adjusted as the business changes.** Supply chain transformation is a journey, and working with IT consulting partners should be viewed through the lens of a longer-term partnership. But to ensure satisfaction and success, manufacturers and retailers need to work with partners to agree on goals and KPIs. Value-sharing engagement is becoming quite popular.
- **Select an IT vendor with flexible and varied business model experience.** Supply chain transformation and shifting business models are part of the journey for manufacturers that do not have a well-defined endpoint. Manufacturers need to be strategic about how the digital tools they invest in accelerate their transformation, as opposed to driving further gaps in knowledge or disconnected silos. IT consulting vendors can aid manufacturers in this journey.
- **Seek partners that focus on delivering value and solving specific use cases.** Many can recount solid stories about their work on advanced capabilities. Double-clicking with potential partners about their approach to delivering measurable, meaningful value will help you choose the right fit for your business.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

IBM

IBM is positioned in the Leaders category in this 2025–2026 IDC MarketScape for worldwide supply chain Oracle ecosystem services vendor assessment.

IBM is a global IT consulting and services firm incorporated in Armonk, New York. IBM, founded in 1911, has been delivering supply chain management offerings and services for over 40 years, with thousands of employees globally supporting manufacturing. IBM has supply chain management clients around the world, with a significant client base in North America, Europe, and APAC. IBM serves a variety of manufacturing subverticals, with notable capabilities in high tech, consumer goods, life sciences, retail, and automotive. IBM's range of services includes application development, maintenance, and support; supply chain strategic consulting; systems implementation and integration; and business process outsourcing.

IBM's global supply chain practices have deep industry and functional expertise, as well as technology and data know-how, which the company has used to innovate its own supply chain, a unique type of first-hand experience. With services across nearly every supply chain application and platform, IBM offers a wide variety of solutions, including in-depth solutions for the Oracle ecosystem.

IBM blends its supply chain expertise and deep roots in technology to deliver supply chain services and transformations fit for a variety of business needs.

Strengths

IBM has a complete set of supply chain transformation capabilities across almost every supply chain product suite, enhanced with IBM applications. The company recently realigned its resources to deliver skill sets, functionality, and process expertise for a future-based supply chain.

IBM was an early investor in AI and other emerging technologies specifically related to the supply chain, and it brings a set of capabilities leveraging full resources, including its proprietary methodologies, along with industry and Oracle expertise and technical capabilities.

IBM is focused on innovating and delivering innovative solutions that drive quantifiable business outcomes, including the concept of the self-correcting supply chain, through building sense-and-respond capabilities. IBM brings proven expertise, tools, and agile methodologies, successful optimization, and solution management to hundreds of clients. The company also has a carefully curated list of SaaS partners to help address specific use cases in the supply chain.

IBM's Oracle-specific strengths include:

- A proven track record of large-scale implementations across complex industries
- Complimentary applications and microapps to elevate results with Oracle
- Optimization, AI, intelligent fulfillment, traceability, and other solutions working with Oracle

Challenges

IBM's technical background and focus on advanced technologies can sometimes be a mismatch with potential clients' readiness. Other challenges are costs and clients' preference for narrow technology updates rather than broader business transformation. To address the question of technical readiness for some clients, IBM has been implementing proofs of concept within its own operations.

Consider IBM When

Manufacturers across all industries and geographic regions should consider IBM when looking for an Oracle partner that can drive SCM value and supply chain transformation on a global scale with robust technological capabilities. Some clients will appreciate IBM using its own supply chain as proving grounds for its approach.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies

category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Supply chain Oracle ecosystem services are a wide range of services that IT service firms deliver to help manufacturing and retail organizations make decisions, improve business processes, assess and implement supply chain tools, and reshape supply chain operations. Significant components include:

- **Systems implementation and/or integration:** This component helps companies run their supply chain organizations more effectively and efficiently, make better resource trade-offs and decisions, improve overall business process performance, and optimally implement supply chain applications and tools.
- **Strategic consulting:** While systems implementation/integration is often aligned with technology initiatives, strategy consulting efforts are not always specific to IT applications; they may be aligned with reengineering supply chain planning processes, rethinking enterprisewide approaches to planning initiatives, or how the supply chain can support a fundamental rethinking of the overall business model.
- **Application development, maintenance, and support:** This component includes the ability to develop adjacent tools and task apps to bolster the capabilities of the Oracle SCM suite, as well as the ability to support implementations and help manage upgrades.

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Supply Chain All Other Ecosystems Services 2025–2026 Vendor Assessment* (IDC #US53933125, December 2025)
- *IDC MarketScape: Worldwide Supply Chain Blue Yonder Ecosystem Services 2025–2026 Vendor Assessment* (IDC #US53933025, December 2025)
- *IDC MarketScape: Worldwide Supply Chain SAP Ecosystem Services 2025–2026 Vendor Assessment* (IDC #US53932725, December 2025)
- *IDC MarketScape: Worldwide Supply Chain Overall Ecosystem Services 2025–2026 Vendor Assessment* (IDC #US53932825, December 2025)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of the IT consulting providers supporting supply chain management processes. This study specifically analyzed these offerings within the supply chain across the Oracle ecosystem services suite. Oracle continues to be a prominent and innovative supply chain management ecosystem and is a central player in global supply chains. This IDC MarketScape looks at the IT consulting firms focusing on both a deep and a broad set of offerings and capabilities to support supply chain management across the Oracle ecosystem.

Note that IDC is producing five IDC MarketScapes (including this one): All Ecosystems, Blue Yonder, Oracle, SAP, and All Other. Buyers looking to dive deeper into another ecosystem are encouraged to read the appropriate IDC MarketScape. This Oracle study gives buyers an idea about the vendors that can support the Oracle ecosystem end to end.

"Supply chains and supply chain functions have grown in focus, strategic priority, and investment spending. At the same time, the complexity of operations and the sophistication of technology are presenting the need to level up digital capabilities. This places a premium on selecting strategic services partners who can help improve processes, technologies, and capabilities in supply chain and promote selecting best-fit technology vendors," says Eric Thompson, research director, Worldwide Supply Chain Planning and Services at IDC.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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